



STATEWIDE PERSONNEL
— S Y S T E M —

**Contractual Conversion
(SPMS Agencies)**

December 2014



Table of Contents

| | |
|---|----------|
| Change Job – Contractual Conversion | 3 |
| Transfer - Contractual Conversion | 4 |
| Propose Compensation Change - Contractual Conversion | 10 |
| Assign Pay Group - Contractual Conversion | 12 |
| Edit Other IDs - Contractual Conversion | 14 |
| Maintain Employee Contracts - Contractual Conversion..... | 18 |
| Manage Business Processes for Worker - Contractual Conversion | 20 |



Change Job – Contractual Conversion

Business Process Overview

To complete a contractual conversion you must complete the following tasks in Workday:

1. **Initiate a Transfer.** Transfer the contractual employee to a State/Regular position that is equivalent to the contractual position.
2. **Propose Compensation Change.** Change the employee's salary plan from an Hourly Plan to a Salary Plan. The transfer and compensation requires approval from the Agency HR Partner and Appointing Authority Partner.
3. **Review Pay Group.** Review the proposed pay group. It should be updated to a State/Regular employee pay schedule. Note that after this task is complete, the contractual conversion is complete in Workday; however, **ALL** tasks in this list must be completed by the HR Coordinator.
4. **Edit Other IDs.** Mark the employee as a Contractual Conversion. This designation will be on the employee's record.
5. **Maintain Employee Contract.** Close the worker contract since they have converted to a merit position.
6. **Manage Business Processes for Worker.** If the employee has pending tasks in their inbox, the HR Coordinator determines whether the tasks should be reassigned or cancelled.

Before you begin...

You will need the following information to complete the contractual conversion:

- A vacant State/Regular position, including position number and name
- The Supervisory Org name and the Manager name of the vacant State/Regular position
- The State/Regular salary plan (e.g., Step)
- The employee's new pay group (e.g., Biweekly Regular 10/21, 10/26, or 10/98; or Monthly 30/12)

Transfer - Contractual Conversion

Verify that there is a vacant State/Regular position that is “available to fill” prior to starting this task. The procedure to transfer a contractual employee from a contractual position to a State/Regular position follows.

Procedure:

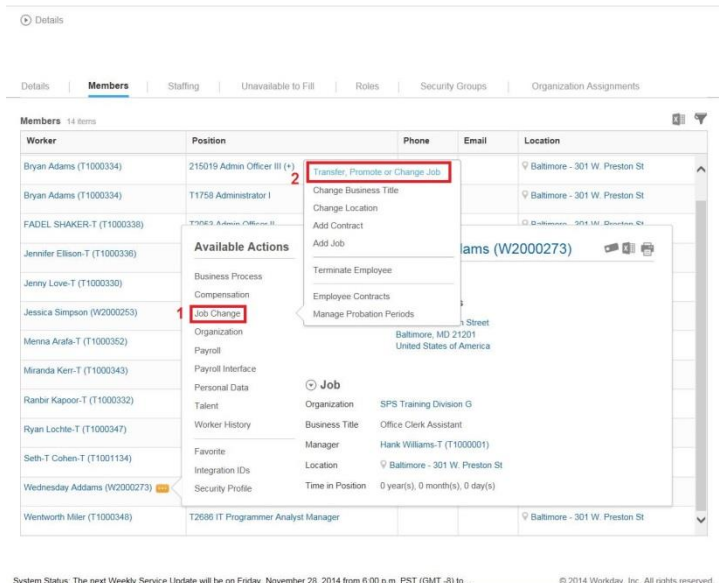
1. Search for the employee.



Tip: Use the search field to type the employee's name or employee ID or type the employee's supervisory organization and search on the **Member's** tab.

2. Click the Related Actions and Preview  icon next to the employee's name.

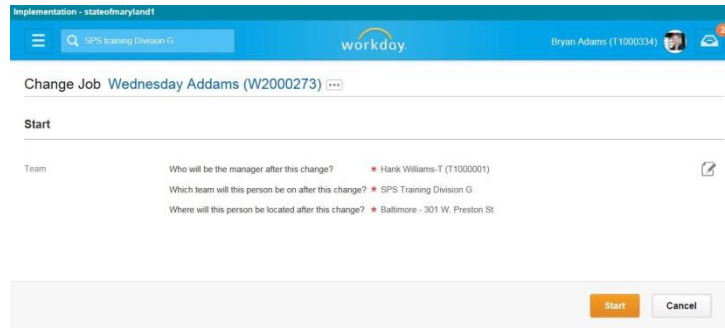
Available Actions




The screenshot shows the 'Members' tab in the SPS system. A list of employees is displayed with columns for Worker, Position, Phone, Email, and Location. The employee 'Wednesday Addams (W2000273)' is highlighted. A red box highlights the 'Transfer, Promote or Change Job' option in the 'Available Actions' dropdown menu. Another red box highlights the 'Job Change' option in the 'Available Actions' dropdown menu. The 'Job Change' option is also highlighted with a red box. The 'Transfer, Promote or Change Job' option is also highlighted with a red box.

3. Hover over Job Change, and then click Transfer, Promote or Change Job.

Change Job



4. Click the Edit  icon to update the following fields on the **Start** page, including:

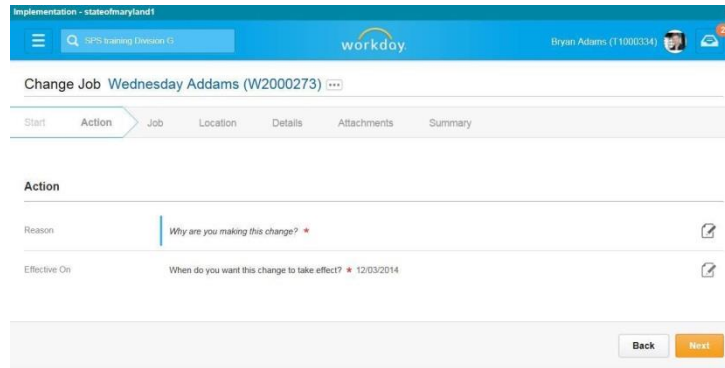
- Who will be the manager after this change? (enter manager after the change, if applicable)
- Which team will this person be on after this change? (enter the Supervisory Org after the change, if applicable)
- Where will this person be located after this change? (enter the location after the change, if applicable)



Information: The Supervisory Org and Location default from the manager selected. If the manager supervises more than one team, you will need to select the appropriate Supervisory Org.

5. Click the **Start**  button.


Change Job



6. Click the Edit  icon to update the fields on the fields on the **Action** page, including:

- **Reason** (select the “Transfer – Contractual Conversion” reason)
- **Effective On** (enter the date the transfer is effective)

7. Click the **Next**  button.

8. If the employee is transferring to a new manager, the **Move** page displays. Click the Edit  icon to review/update the following field on the **Move** page:

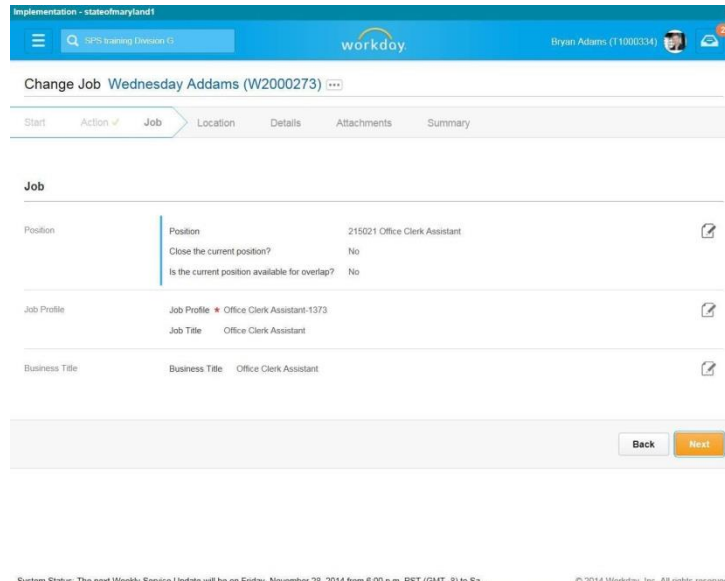
- What do you want to do with the opening left on your team?




Information: ALWAYS select “I plan to backfill this headcount” if you want the position that the employee is leaving to remain open.

9. Click the Next  button.

Change Job



10. Click the Edit  icon to update the fields on the Job page, including:


- **Position** (use the Prompt the select the State/Regular position number/name which the contractual is moving into)
- **Job Profile** (do not change; defaults from the position selected)
- **Business Title** (change, if desired; **NOTE:** the Business Title displays on the org chart)

11. Click the **Next**  button.

12. Click the Edit  icon to update the following fields on the **Location** page, if applicable:

- **Scheduled Weekly Hours** (update if making a worker FTE change)

13. Click the **Next**  button.

14. Click the Edit  icon in the Administrative section of the **Details** page to update the following fields, if applicable:

- **Time Type** (example part-time/full-time, for FTE changes; this may also default from the position selected)



Information: Do not update other fields on this page as they default from the position, job profile, or other selections.

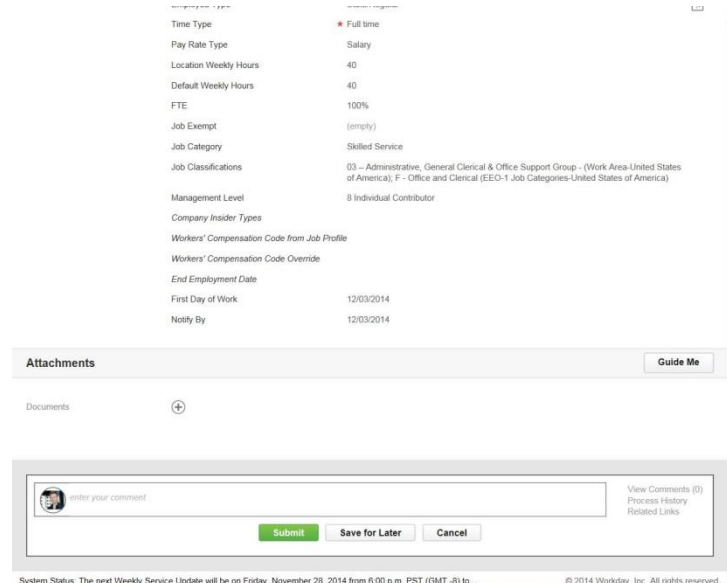
15. Click the **Next**  button.

16. Click the Add a New Row  icon to add an attachment, if applicable.

- Select the appropriate **Document Category**
- Click the **Attach** button, browse and select a document to attach.

17. Click the **Next**  button.

Change Job



The screenshot shows a web form for changing a job. It includes fields for Time Type (Full time), Pay Rate Type (Salary), Location Weekly Hours (40), Default Weekly Hours (40), FTE (100%), Job Exempt (empty), Job Category (Skilled Service), Job Classifications (03 – Administrative, General Clerical & Office Support Group - (Work Area-United States of America), F - Office and Clerical (EEO-1 Job Categories-United States of America)), Management Level (8 Individual Contributor), Company Insider Types, Workers' Compensation Code from Job Profile, Workers' Compensation Code Override, End Employment Date, First Day of Work (12/03/2014), and Notify By (12/03/2014). Below these fields is an Attachments section with a plus icon and a Guide Me button. At the bottom, there is a comment box with a Submit button, a Save for Later button, and a Cancel button. A footer bar contains system status and copyright information.

18. Review the **Summary** page and then click the **Submit**  button.



Tip: After completing a task in the business process, you can view the next steps.

- Click the drop-down arrow next to **Details and Process** to expand the section
- Click the **Process** tab to see the path that the process will take.
- If the HR Coordinator is also the HR Partner, they may immediately receive a Review task.



Change Job

workday On behalf of: Bonnie Smith (W1050460)

You have submitted [Transfer: Wednesday Adams](#)

Up Next

Jenny Love-T T1000330
Propose Compensation Change
Due Date 12/20/2014
[Open](#)

Do Another

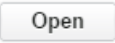
[Change Job](#)
[Request Transfer](#)

[Details and Process](#)

[Done](#)

System Status: The next Weekly Service Update and Monthly Maintenance will be on Friday, December 19, 2014 from 6:...

© 2014 Workday, Inc. All rights reserved.

19. Click the **Open**  button to go to the next task.
20. The System Task is complete.

Propose Compensation Change - Contractual Conversion




After the transfer for the contractual employee is submitted, the compensation for the employee must be adjusted from an hourly plan to a salary plan. Use the procedure below to complete a compensation change for the contractual conversion.

Procedure:

Propose Compensation Change

Propose Compensation Change [215020 Office Clerk Assistant](#) [Wednesday Adams \(W2000273\)](#)

| Compensation | Current | Proposed |
|----------------------------|---|--|
| Effective Date & Reason | Effective Date 12/18/2014 Use Next Pay Period No Reason Transfer > Transfer > Transfer - Contractual Conversion | |
| Total Base Pay | Total Base Pay 34,278.40 USD Annual | No Change |
| Primary Compensation Basis | Basis Total Salary and Allowances Basis Details 34,278.40 USD Annual | No Change |
| Guidelines | Pay Range 29,874.00 - 38,324.00 - 46,774.00 USD Annual | No Change |
| Salary | | + |
| Hourly | | + |
| | Assignment Details 16.48 USD Hourly Plan Name Hourly Plan Effective Date 10/22/2014 | No Change |
| Unit Salary | | + |
| Allowance | | + |
| | Assignment Details 27,977.11 USD Contract NTE\$ Plan Name Contract NTE\$ Effective Date 10/22/2014 | Assignment Details DELETED Plan Name Contract NTE\$ Effective Date 10/22/2014 |

1. In the Current column, Review the current Total Base Pay.
2. In the Proposed column, hover over the Hourly row. Then, click the Remove  **Remove** link that appears next to the Edit notepad.
3. Click Edit  icon in the appropriate row (e.g., Guidelines for Grade/Step or Salary for Slope) to update the compensation.
4. Click anywhere on the screen to refresh the Total Base Pay.
5. You may need to delete the Contract "Not to Exceed Amount" (NTE\$) in the Allowance row (if it appears). In the Proposed column, hover over the Allowance row. Then, click the Remove  **Remove** link that appears next to the Edit notepad.
6. Verify the Total Base Pay in the Proposed column before submitting the request.

Request Compensation Change

| Primary Compensation Basis | | Basis | | Total Salary and Allowances | |
|----------------------------|--|----------------------|--|--|--|
| Basis Details | | 29,411.20 USD Annual | | | |
| Guidelines | | Pay Range | | 22,261.00 - 28,285.00 - 34,309.00 USD Annual | |
| Salary | | Pay Range | | 22,261.00 - 28,285.00 - 34,309.00 USD Annual | |
| Assignment Details | | Plan Name | | Effective Date | |
| Assignment Details | | 29,778.00 USD Annual | | | |
| Plan Name | | Salary Plan | | | |
| Effective Date | | 12/03/2014 | | | |
| Hourly | | Assignment Details | | 14.14 USD Hourly | |
| Plan Name | | Hourly Plan | | Effective Date | |
| Effective Date | | 11/26/2014 | | | |
| Unit Salary | | Assignment Details | | 29,411.20 USD Contract NTES | |
| Allowance | | Plan Name | | Contract NTES | |
| Effective Date | | 11/26/2014 | | | |
| | | No Change | | | |

[View Comments \(0\)](#)
[Process History](#)
[Related Links](#)

7. Click the **Submit** button.

Up Next

Success! Event submitted [Compensation Change: Wednesday Adams \(W2000273\)](#)

Up Next
 HR Partner
[Transfer: Wednesday Adams \(W2000273\) - Consolidated Approval by HR Partner](#)
 Due Date: 12/02/2014

Details and Process

System Status: The next Weekly Service Update and Monthly Maintenance will be on Friday, December 19, 2014 from 6...


8. Click the **Done** button. The request will route for approval.

9. The System Task is complete.

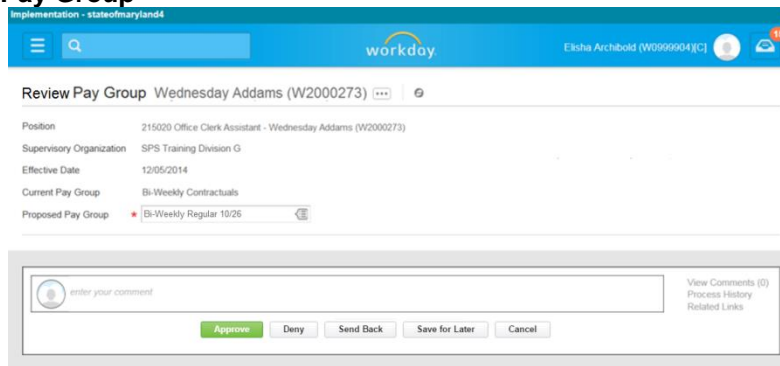
Assign Pay Group - Contractual Conversion

After successfully transferring the contractual employee to a State/Regular position and updating the employee's compensation, change the pay group from a "Biweekly – Contractual" schedule to the appropriate State/Regular schedule. Use the procedure below to update the employee pay group.

Procedure:


1. Click the inbox  icon.
2. Click the View Inbox hyperlink.
3. On the **Actions** tab, click the "Assign Pay Group for Transfer" task. The employee's name displays in the task name.

Inbox: Assign Pay Group



System Status: The next Weekly Service Update will be on Friday, December 5, 2014 from 6:00 p.m. PST (GMT -8) to Sat...

© 2014 Workday, Inc. All rights reserved.

4. Review the Proposed Pay Group assigned. This value defaults. Change, if needed.
5. Click the **Approve**  button.

Inbox: Up Next

Inbox

Success! Event approved [Assign Pay Group for Transfer: Wednesday Addams \(W2000273\)](#) ...

Up Next

Jenny Love

Edit Other ID's

To Do

Details and Process

Done

System Status: The next Weekly Service Update and Monthly Maintenance will be on Friday, December 19, 2014 from...

© 2014 Workday, Inc. All rights reserved.

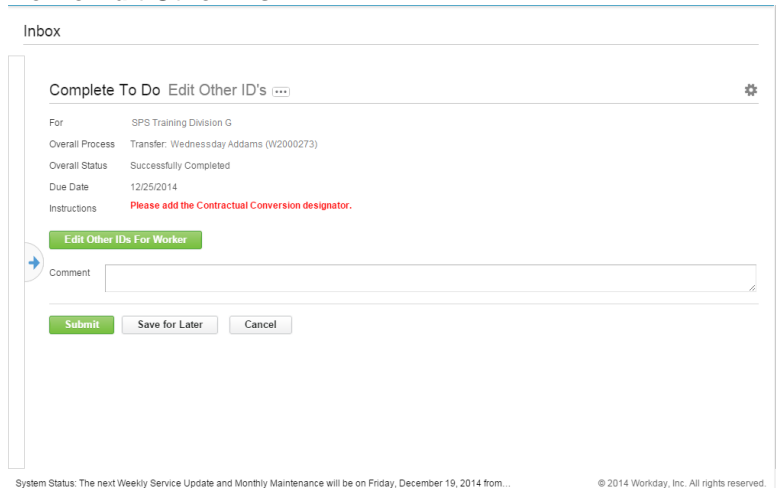
6. Click the **To Do**  button to open the next task.

Edit Other IDs - Contractual Conversion

After reviewing the Pay Group for the employee, add the “Contractual Conversion” designation to the employee’s profile. This task is accessed from your inbox. Use the procedure below.

Procedure:

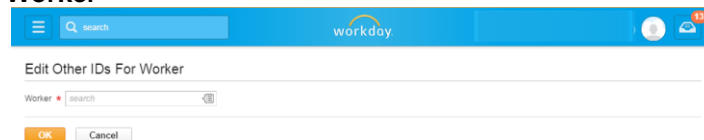
Inbox: Complete To Do Edit Other IDs





Information: If you did not open the Edit Other IDs task after completing the “Review Pay Group” task, find and click the “Edit Other IDs: Transfer” task in your inbox. The employee’s name will appear in the task name.




1. Click the Edit Other IDs For Worker  button.

Edit Other IDs for Worker



2. Type the employee’s name in the **Worker** field.
3. Click the **OK**  button.

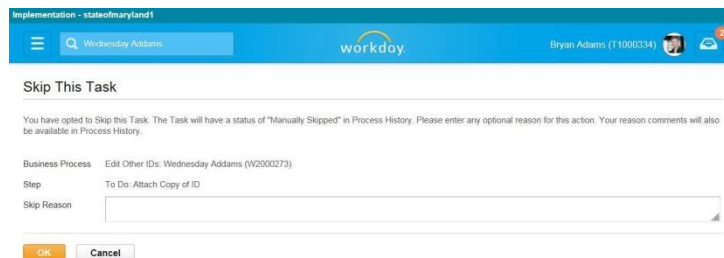
Edit Other IDs for Worker

4. On the **Edit Other IDs for Worker** page, click the Add Row  icon.
5. Click the **Other ID Type**  dropdown.
6. Click the **Contractual Conversion** item.
7. Type the worker's employee ID in the **Identification #** field.
8. Enter the Contractual Conversion Date in the Issue Date field.
9. Enter a comment, if desired.
10. Click the **Submit**  button.
11. On the Up Next page for Attach Copy of ID, click the **Skip** hyperlink.




Information: Documentation is not required; you may skip this task.

Skip This Task

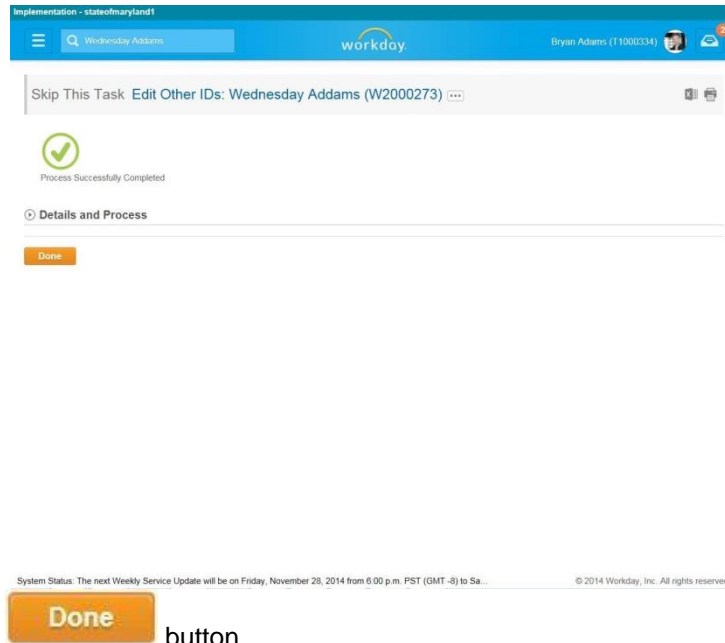


System Status: The next Weekly Service Update will be on Friday, November 28, 2014 from 6:00 p.m. PST (GMT-8) to Sa...

© 2014 Workday, Inc. All rights reserved.

12. Enter a reason for skipping the task in the **Skip Reason** field.
13. Click the **OK**  button.

Skip This Task



Implementation - stateofmaryland1

workday

Bryan Adams (11000334)

Skip This Task Edit Other IDs: Wednesday Addams (W2000273) ...

Process Successfully Completed

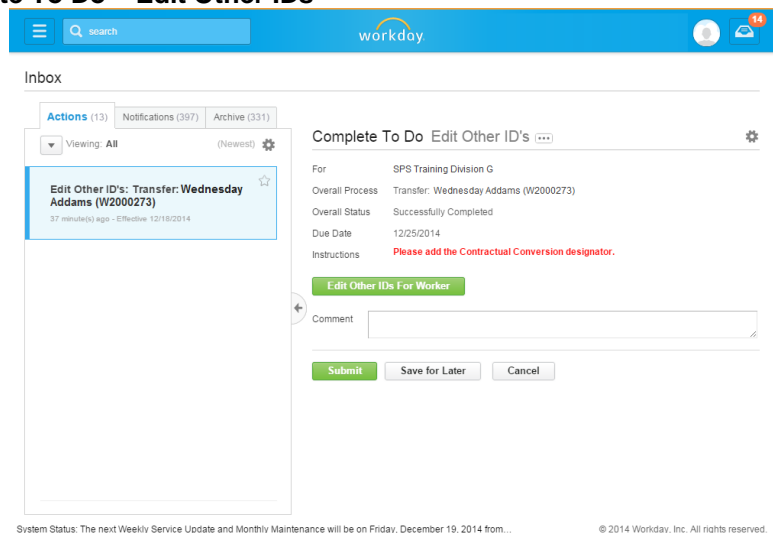
Details and Process

Done

System Status: The next Weekly Service Update will be on Friday, November 28, 2014 from 6:00 p.m. PST (GMT -8) to Sa... © 2014 Workday, Inc. All rights reserved.

14. Click the **Done** button.

Inbox: Complete To Do – Edit Other IDs



Inbox

Actions (13) Notifications (397) Archive (331)

Viewing: All (Newest)

Edit Other IDs: Transfer: Wednesday Addams (W2000273)

37 minute(s) ago - Effective: 12/18/2014

Complete To Do Edit Other ID's ...

For SPS Training Division G

Overall Process Transfer: Wednesday Addams (W2000273)

Overall Status Successfully Completed

Due Date 12/25/2014

Instructions Please add the Contractual Conversion designator.

Edit Other IDs For Worker

Comment

Submit Save for Later Cancel

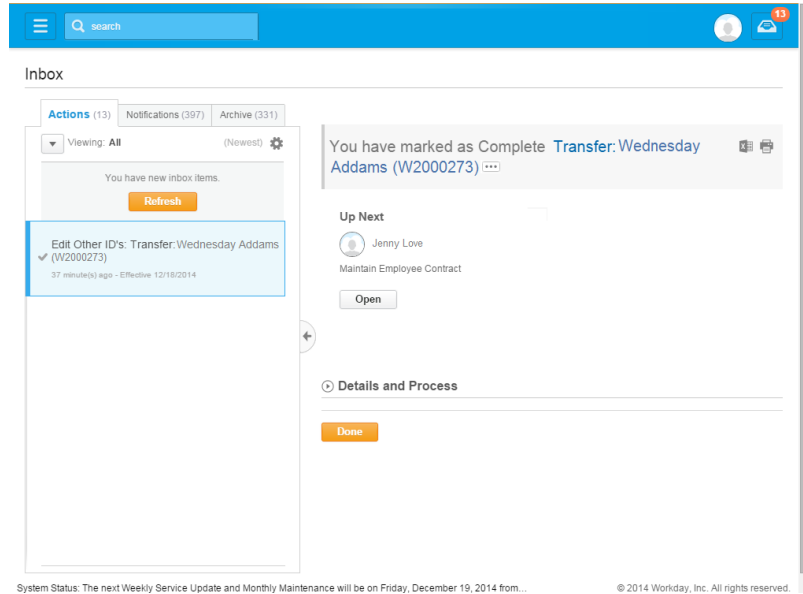
System Status: The next Weekly Service Update and Monthly Maintenance will be on Friday, December 19, 2014 from... © 2014 Workday, Inc. All rights reserved.

15. You must submit the “Edit Other IDs” task. Click the **Submit** button. ‘



Information: After clicking the **Done** button (in the previous step), the system directs you back to the “Edit Other IDs” task in your inbox.

Inbox: Up Next



The screenshot shows the 'Inbox: Up Next' interface. At the top, there is a blue header bar with a search bar, a user profile icon, and a notification badge with the number '13'. Below the header, the 'Inbox' section is visible. It includes tabs for 'Actions (13)', 'Notifications (397)', and 'Archive (331)'. A 'Viewing: All' dropdown and a '(Newest)' sort option are present. A message states 'You have new inbox items.' with a 'Refresh' button. A task card is displayed: 'Edit Other ID's: Transfer: Wednesday Addams (W2000273)' with a checkmark, indicating it is complete, and a timestamp '37 minute(s) ago - Effective 12/18/2014'. To the right, a 'Up Next' section shows a task assigned to 'Jenny Love' with the description 'Maintain Employee Contract' and an 'Open' button. Below this, a 'Details and Process' section contains a 'Done' button. At the bottom, a system status message reads: 'System Status: The next Weekly Service Update and Monthly Maintenance will be on Friday, December 19, 2014 from...'. A copyright notice '© 2014 Workday, Inc. All rights reserved.' is also visible.

16. Click the **Open**  button to start the next task.

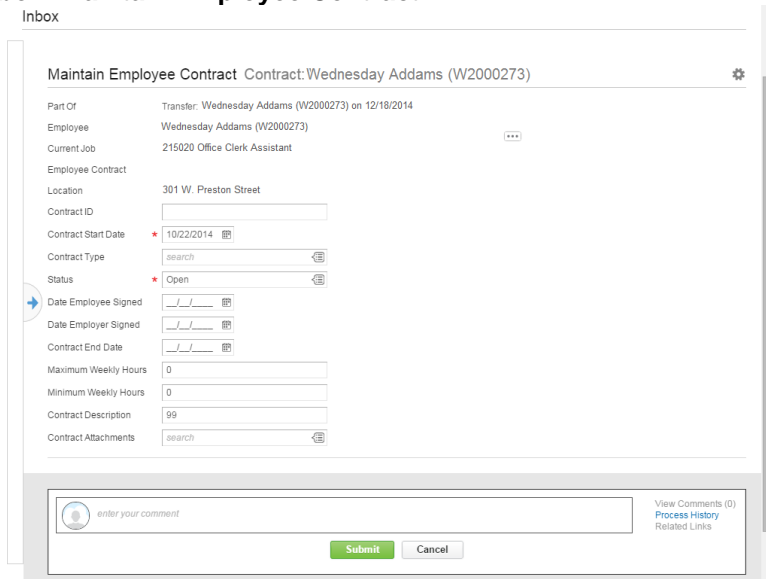
17. The System Task is complete.

Maintain Employee Contracts - Contractual Conversion


After adding the “contractual conversion” designator to the employee’s worker profile, the next task is to close any open contracts for the worker. Use the procedure below to close employee contracts.

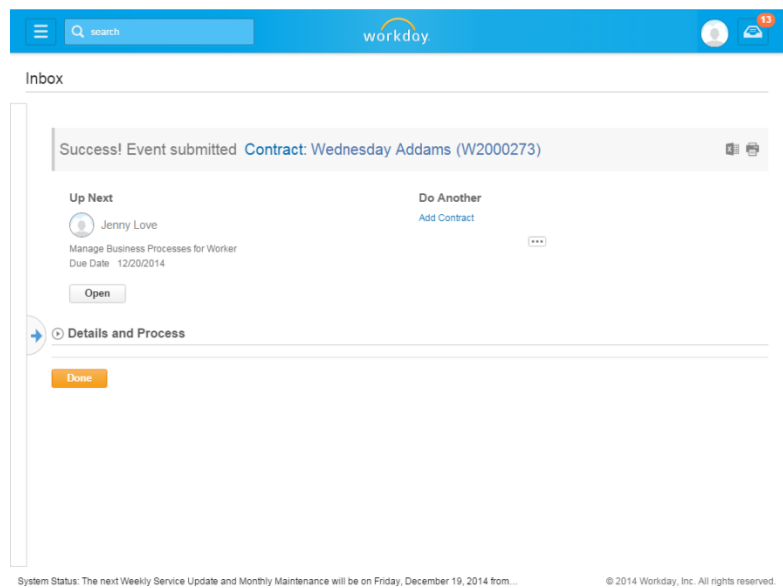
Procedure:


Inbox: Maintain Employee Contract



Information: If you did not open the Maintain Employee Contract task after completing the “Edit Other IDs” task, find and click the “Contract” task in your inbox. The employee’s name appears in the task name.

1. Use the prompt to update the **Status** to “Closed”.
2. Use the Calendar icon to update the **Contract End Date**, if applicable.
3. Click the **Submit**  button.



4. Click the **Open** button to start the next task (if applicable) or click the **Done**  button (if there is no task that follows).



Information: If there are tasks in the employee's inbox, the HR Coordinator may also receive the "Manage Business Processes for Worker" task. Click the **Open** button to start this task.

5. The System Task is complete.

Manage Business Processes for Worker - Contractual Conversion

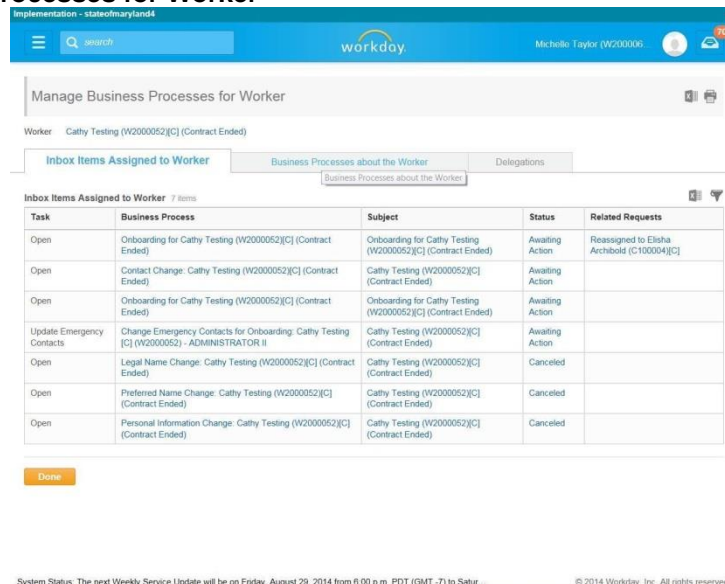
If there are tasks in the employee's inbox, the HR Coordinator may also receive the "Manage Business Processes for Worker" task. Use the procedure below to close employee contracts.

Procedure:



Information: If you did not open the Manage Business Processes for Worker task after completing the "Maintain Employee Contract" task, find and click the "Transfer" task in your inbox. The employee's name appears in the task name.

Manage Business Processes for Worker



Implementation - stateofmaryland4

workday

Michelle Taylor (W2000005)

Manage Business Processes for Worker

Worker Cathy Testing (W2000052)(C) (Contract Ended)

Inbox Items Assigned to Worker Business Processes about the Worker Delegations

Inbox Items Assigned to Worker 7 items

| Task | Business Process | Subject | Status | Related Requests |
|---------------------------|---|---|-----------------|---|
| Open | Onboarding for Cathy Testing (W2000052)(C) (Contract Ended) | Onboarding for Cathy Testing (W2000052)(C) (Contract Ended) | Awaiting Action | Reassigned to Elisha Archibald (C100004)(C) |
| Open | Contact Change: Cathy Testing (W2000052)(C) (Contract Ended) | Cathy Testing (W2000052)(C) (Contract Ended) | Awaiting Action | |
| Open | Onboarding for Cathy Testing (W2000052)(C) (Contract Ended) | Onboarding for Cathy Testing (W2000052)(C) (Contract Ended) | Awaiting Action | |
| Update Emergency Contacts | Change Emergency Contacts for Onboarding: Cathy Testing (C) (W2000052) - ADMINISTRATOR II | Cathy Testing (W2000052)(C) (Contract Ended) | Awaiting Action | |
| Open | Legal Name Change: Cathy Testing (W2000052)(C) (Contract Ended) | Cathy Testing (W2000052)(C) (Contract Ended) | Canceled | |
| Open | Preferred Name Change: Cathy Testing (W2000052)(C) (Contract Ended) | Cathy Testing (W2000052)(C) (Contract Ended) | Canceled | |
| Open | Personal Information Change: Cathy Testing (W2000052)(C) (Contract Ended) | Cathy Testing (W2000052)(C) (Contract Ended) | Canceled | |

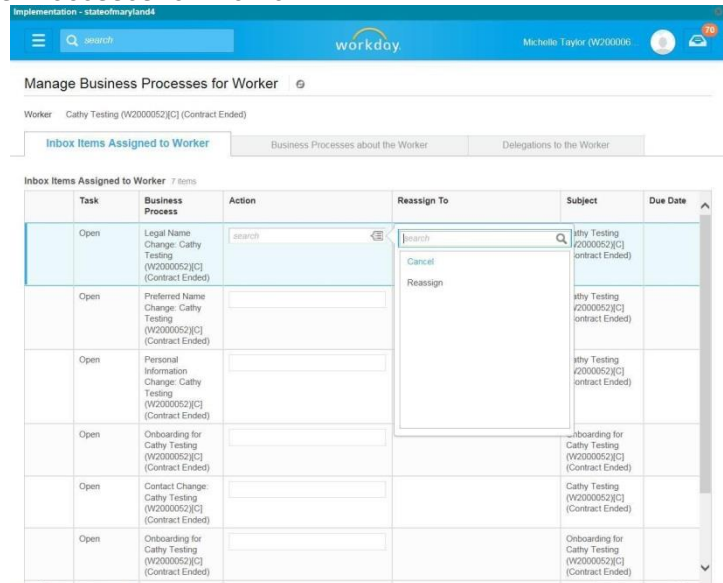
Close

System Status: The next Weekly Service Update will be on Friday, August 29, 2014 from 6:00 p.m. PDT (GMT -7) to Satur... © 2014 Workday, Inc. All rights reserved.

1. To cancel or reassign tasks, click on the "Inbox Items Assigned to Worker"

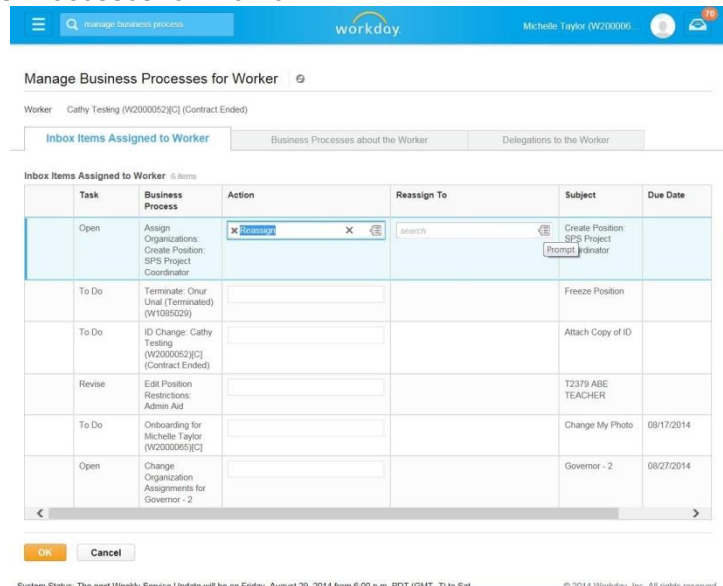
Inbox Items Assigned to Worker tab.

Manage Business Processes for Worker



- In the **Action** column, type or use the prompt to select an action (i.e., cancel or reassign).

Manage Business Processes for Worker



- If you are reassigning the task, type or use the prompt to select the worker to whom you are reassigning business process tasks.

- Click the **OK** button.


- Click the **Submit** button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Cancel** to cancel the process and start at another time.



6. Click the **Done**  button.
7. The System Task is complete.